

# FIN 438 STUDENT-MANAGED ENDOWMENT FUND APPLICATION FORM FOR ANALYSTS AND MANAGERS

Submit application, a copy of your current STAR report, and any supporting materials to the Finance Program Assistant in Sage Hall 1462. Applications are due October 11 for Spring semester and March 8 for Summer and Fall semesters (unless posted otherwise).

## APPLICANT INFORMATION

Date \_\_\_\_\_

Name: \_\_\_\_\_ Student ID # \_\_\_\_\_

Local Address: Street \_\_\_\_\_ City \_\_\_\_\_ St. \_\_\_\_\_ Zip \_\_\_\_\_

Current Phone: \_\_\_\_\_ Current Email: \_\_\_\_\_

Major(s): \_\_\_\_\_ Minors(s)/Emphases: \_\_\_\_\_

Overall GPA: \_\_\_\_\_ Upper-Level Business and Economics Courses GPA: \_\_\_\_\_ Expected Graduation Date: \_\_\_\_\_

Indicate semester(s) by circling one of the following:

**SPRING      SUMMER      FALL      or      SUMMER and FALL**

**FINANCE COURSES:** For each of the courses listed, please indicate whether you have completed the course (with grade earned), are currently enrolled, will take the course next semester, or are uncertain whether you will take this particular course.

Course Title (number)	Course Completed (with grade earned)	Currently Enrolled (with expected grade)	Next Semester	Uncertain
Essentials of Finance (BUS 331)				
Real Estate Finance (FIN 320)				
Financial Markets (FIN 333)				
Investment Management (FIN 334)				
International Finance (FIN 335)				
Fin Planning for Individuals (FIN 351)				
Financial Statement Analysis (FIN 431)				
Security Analysis (FIN 434)				
Advanced Financial Management (FIN 436)				
SMEF (FIN 438)				
Business Risk Mgmt & Insurance (FIN 440)				
Other Relevant Courses				
Other Relevant Courses				

**WORK EXPERIENCE, INTERNSHIPS HELD &/or TRADING EXPERIENCE:** (if applicable, name of employer, dates of employment, and brief description of responsibilities)

**CAREER OBJECTIVES:** briefly state what type of career you would like to pursue within the finance area.

**REASON(S) FOR ENROLLING IN THE STUDENT-MANAGED ENDOWMENT FUND COURSE (438):**  
briefly state why you would like to enroll in this course. What particular strengths would you bring to the team that will comprise this course?

**Manager Application Section:**

After completing at least one semester in the SMEF program, students are eligible to apply for manager. Depending on program needs and funding, we may have full or partial tuition waivers available for summer manager(s).

**SMEF EXPERIENCE(S) THAT ILLUSTRATE(S) MANAGEMENT POTENTIAL:**

What 438 proposal do you consider your best?

Briefly describe a situation that illustrates your management/investment skills and/or knowledge.

How have you contributed to the SMEF program?

**REASON(S) FOR APPLYING TO BE A SMEF MANAGER:** briefly state why you would like to be a manager.